ICJI Egrants User Manager Maintaining User Access Quick Start Guide

This Quick Start Guide is intended to guide User Managers in maintaining user access. From time to time User Managers may need to add additional roles to current users within their agency. They may need to grant access to additional subgrants to users within their agency and they may also need to remove access privileges from users within their agency. This Quick Start Guide will guide User Managers through all of these processes.

Add a Role to a Current User

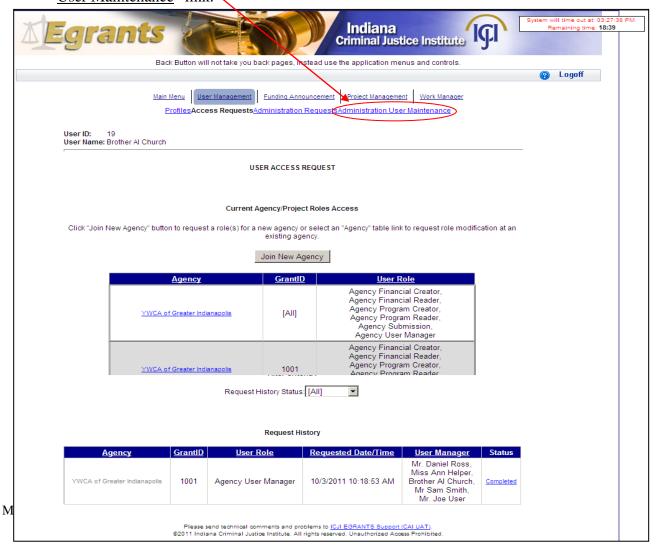
1. Click the <u>User Management</u> tab./

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Back Button will not take yo back pages, instead use the application menus and controls.

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Welcome to ICJI Egrants!



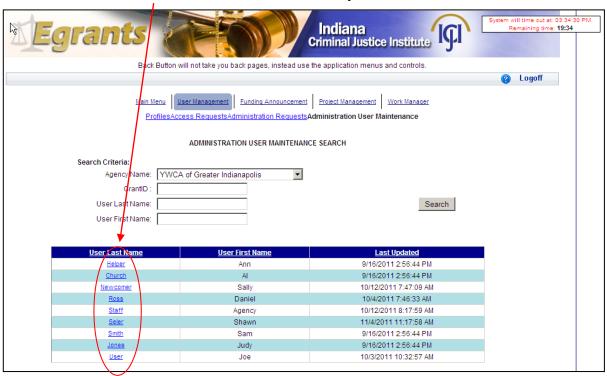


- 4. Enter information in one or more of the "Search Criteria" boxes. Searching by agency name will return all users that have access to the agency selected.
- 5. Click on the "Search" button. Records that match your criteria will be displayed in the grid.

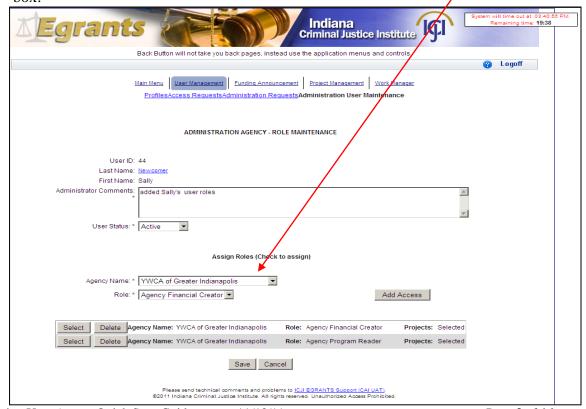
If there are no records that match your criteria the message "No records found!" will be displayed above the grid. This means:

- You entered the name of a person who is not registered. They must first register.
- You incorrectly entered the search criteria. Re-enter the search criteria again.

6. Click on the "User Last Name" link for the user that you wish to add roles.



7. You will be transferred to the "<u>Administration Agency – Role Maintenance</u>" page. Select the agency you are going to grant the user access to from the "<u>Agency Name</u>" drop down box.



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- 8. Select the role that you want to add for the selected user from the "Role" drop down box. (See previous page for screen shot.) The Security Roles Quick Start Guide explains the roles in more detail.
- 9. Click the "Add Access" button. (See previous page for screen shot.)
- 10. A grid will open up showing all subgrants for the agency selected. You may select specific subgrants that the user will have access to or you may select the "All Projects" check box in the upper right corner of the grid. Selecting the "All Projects" check box will give the user access to all current and future subgrants for the agency selected.



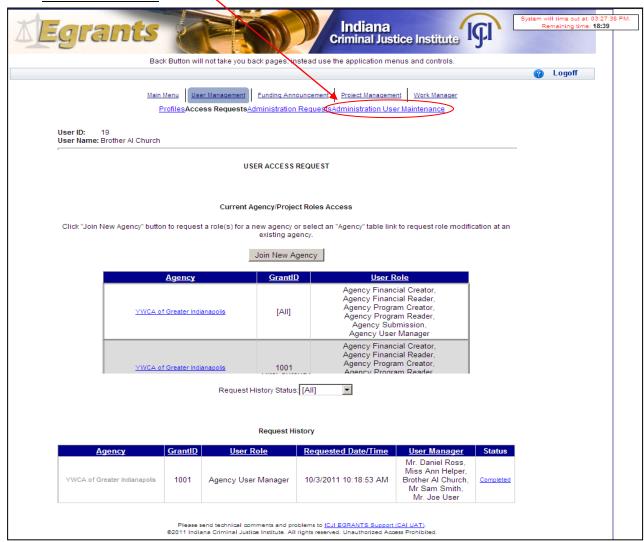
- 11. Click the "<u>Update</u>" button in the upper left corner of the grid after selecting the appropriate subgrants for the user.
- 12. You must repeat steps 6 through 11 for each role that you want to add to a user.

- 13. Enter comments in the "Comments box." (See screen shot on previous page.)
- 14. Once you have added all of the necessary roles, click the "<u>Save</u>" button at the bottom of the page. (See screen shot on previous page.)

Delete a Role From a Current User

1. Click the <u>User Management</u> tab.





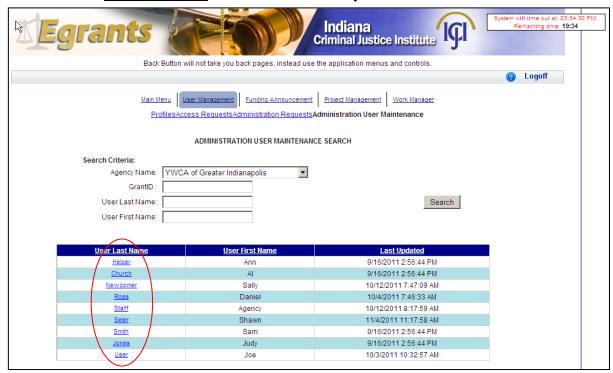


- 4. Enter information in one or more of the "Search Criteria" boxes. Searching by "Agency Name" will return all users that have access to the agency selected.
- 5. Click on the "Search" button. Records that match your criteria will be displayed in the grid. If there are no records that match your criteria the message "No records found!" will be displayed above the grid.

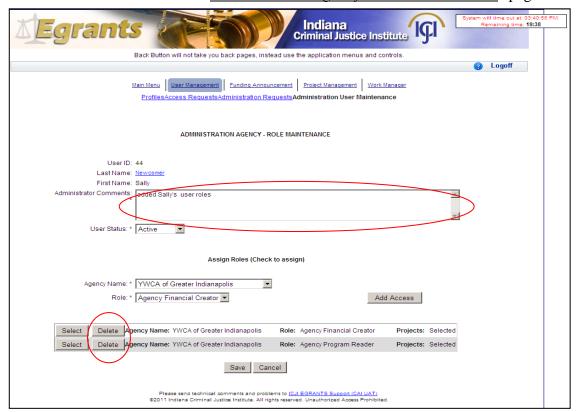
This means:

- You entered the name of a person who is not registered. They must first register.
- You incorrectly entered the search criteria. Reenter the search criteria again.

6. Click on the "User Last Name" link for the user that you wish to delete roles.



7. You will be transferred to the "Administration Agency – Role Maintenance" page.

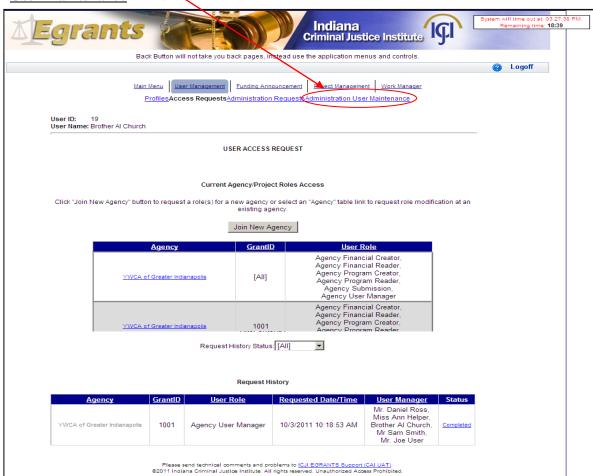


- 8. Scroll to the portion of the page where the user role grid is displayed. Click the "<u>Delete</u>" button to the left of the role that you wish to delete. (See screen shot on previous page.)
- 9. You must repeat step 8 for each role that you want to delete.
- 10. Enter comments in the "Comments box." (See screen shot on previous page.)
- 11. Once you have deleted all of the roles you wish to delete, click the "Save" button at the bottom of the page. (See screen shot on previous page.)

Add Additional Subgrants to a Role Already Assigned to a User

1. Click the <u>User Management</u> tab.







- 4. Enter information in one or more of the "Search Criteria" boxes. Searching by "Agency Name" will return all users that have access to the agency selected.
- 5. Click on the "Search" button. Records that match your criteria will be displayed in the grid. If there are no records that match your criteria the message "No records found!" will be displayed above the grid.

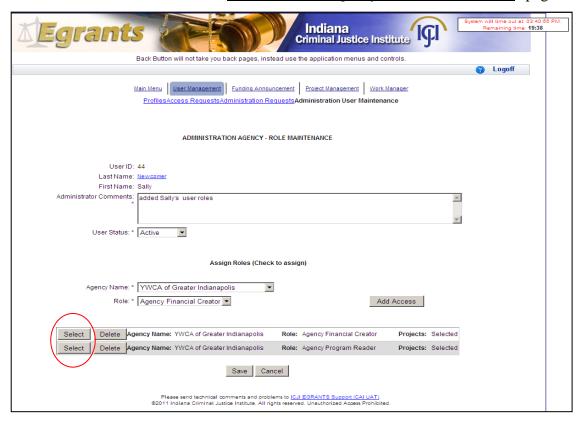
This means:

- You entered the name of a person who is not registered. They must first register.
- You incorrectly entered the search criteria. Reenter the search criteria again.

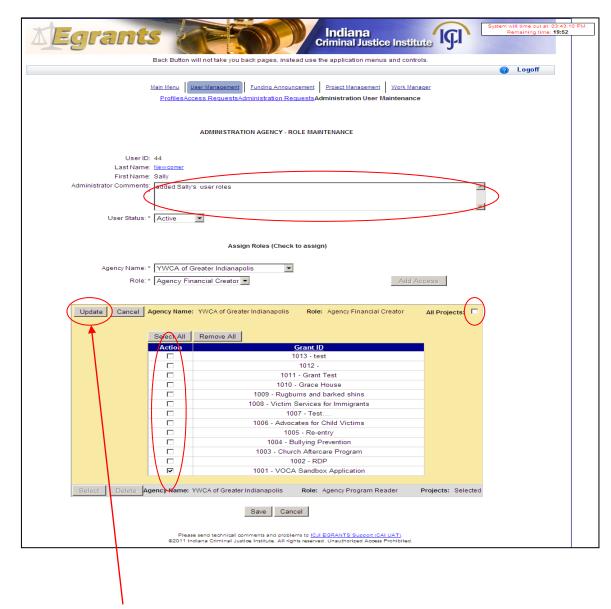
6. Click on the "<u>User Last Name</u>" link for the user that you wish to add additional subgrants.



7. You will be transferred to the "Administration Agency – Role Maintenance" page.



- 8. Scroll to the portion of the page where the user role grid is displayed.
- 9. Click the "<u>Select</u>" button to the left of the role to which you want to add additional subgrants. (See screen shot on previous page.)
- 10. A grid will open up showing all subgrants for the role selected. You may select specific subgrants by clicking the check box to the left of the Grant ID or you may select the "All Projects" check box in the upper right corner of the grid. Selecting the "All Projects" check box will give the user access to all current and future subgrants for the agency selected.



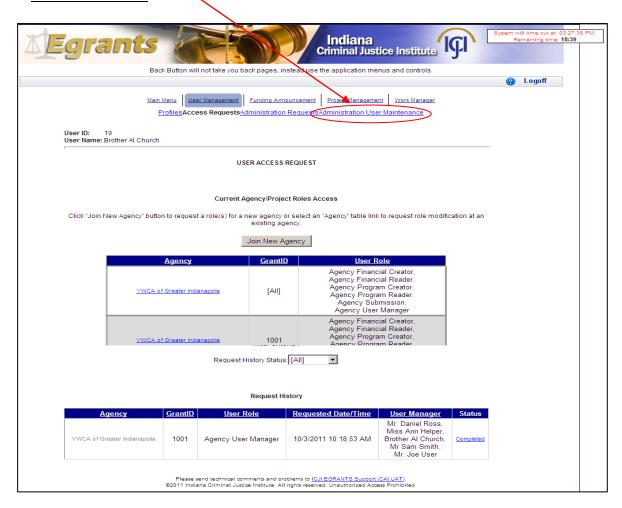
11. Click the "<u>Update</u>" button in the upper left corner of the grid after selecting the appropriate subgrants for the user.

- 12. You must repeat steps 8 through 11 for each role that you want to modify.
- 13. Enter comments in the "Comments box." (See screen shot on previous page.)
- 14. Once you have added all of the necessary subgrants, click the "Save" button at the bottom of the page. (See screen shot on previous page.)

Delete Specific Subgrants From a Role Already Assigned to a User

1. Click the User Management tab.







- 4. Enter information in one or more of the "Search Criteria" boxes. Searching by "Agency Name" will return all users that have access to the agency selected.
- 5. Click on the "<u>Search</u>" button. Records that match your criteria will be displayed in the grid. If there are no records that match your criteria the message "No records found!" will be displayed above the grid.

This means:

- You entered the name of a person who is not registered. They must first register.
- You incorrectly entered the search criteria. Reenter the search criteria again.

6. Click on the "<u>User Last Name</u>" link of the user for which you wish to delete specific subgrants.

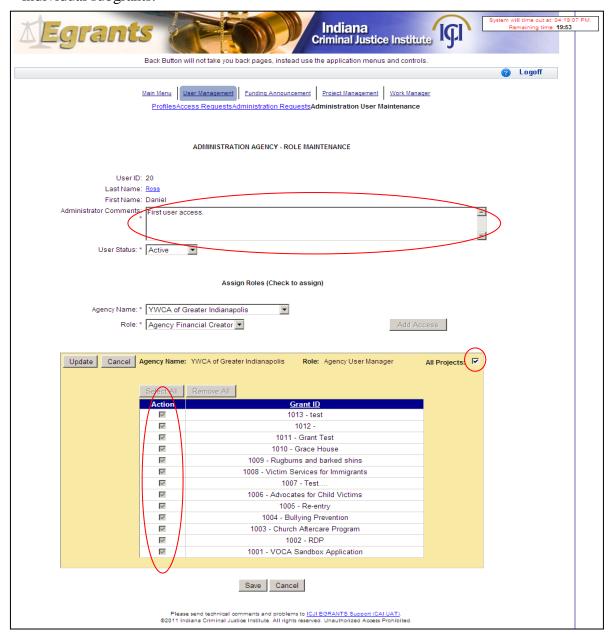


7. You will be transferred to the "Administration Agency - Role Maintenance" page.



- 8. Scroll to the portion of the page where the user role grid is displayed.
- 9. Click the Select button to the left of the role that you want to delete subgrants from.

10. A grid will open up showing all subgrants for the role selected. You may remove access to specific subgrants by removing the checkmark from the check box to the left of the Grant ID. NOTE: If the "All Projects" check box in the upper right corner of the grid is checked, you have to remove that checkmark before you can remove checkmarks for individual subgrants.



- 11. Click the "<u>Update</u>" button in the upper left corner of the grid after removing the appropriate subgrants for that role.
- 12. You must repeat steps 8 through 11 for each role that you want to modify.
- 13. Enter comments in the "Comments box."

14. Once you have deleted all of the necessary subgrants, click the "Save" button at the bottom of the page. (See screen shot on previous page.)